Welcome to…

Request for Quotation/Quotation

Welcome and Introductions

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Course Prerequisites

✓Change Discussions

✓RWD SAP 4.6C

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Course Objectives

- At the end of this course, individuals should be able to use SAP to:

    – Perform Pre-Solicitation Activities

    – Perform Solicitation Activities

    – Evaluate Offers

Benefits of Request for Quotation/Quotation

■SAP provides an automated means to:

- Prepare solicitations

- Communicate solicitations

- Evaluate quotes and proposals

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Course Schedule

Agenda Item	Time (hr)
1. Introduction	00:15
2. Background	00:10
3. Topic 1: Generate Solicitation	01:45
4. Topic 2: Amend and Cancel Solicitation	00:40
5. Topic 3: Evaluate Offers	00:30
6. End of Course Review/Feedback	00:10
Total Course Time	**03:30 hrs**

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Course Structure

- ## Process Flows
  - Overview of key business processes and related SAP concepts

- ## Demonstrations
  - Trainer-led examples of key SAP transactions

- ## Exercises
  - Real-life business tasks using Core Financial business procedures

- ## Training Course Feedback
  - Assessment of course effectiveness using the on-line training course feedback form

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Course Tool: On-Line Quick Reference

- Purpose of the On-Line Quick Reference (OLQR) tool:

  - Provide procedures, job aids, and Help content via the Intranet

  - Assist during and after Instructor-Led Training (ILT) and Web-Based Training (WBT)

Prepare Your Workspace

- Take a few minutes to prepare your training workspace:

    - Review the reference materials; become familiar with the content

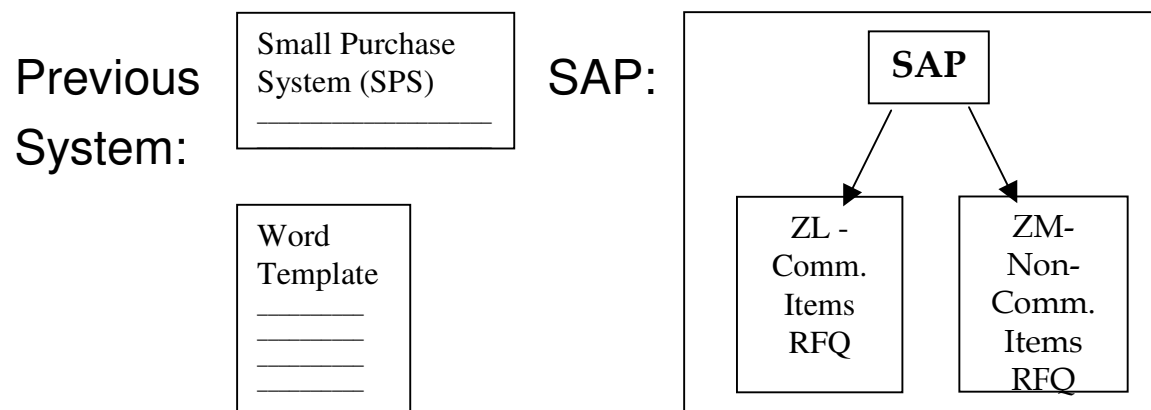   - Logon to SAP R/3

Background Knowledge

Background Knowledge

- Key definitions:

  - **RFQ:** In SAP, this term refers to any type of solicitation including: Invitation for Bids (IFB), Cooperative Agreement Notice (CAN), NASA Research Announcement (NRA), Commercial Item Solicitation, Announcement of Opportunity (AO), Request for Offer (RFO), Request for Proposal (RFP), and Construction Non-Midrange Solicitation.

  - **Collective Number:** This is the solicitation number. The format for the collective number is a two digit FY-three digit Pgroup-three digit Sequence number (e.g., 02-M11-001).

  - **Quote:** An offer received in response to a solicitation that is entered in SAP.

Background Knowledge

- ## Differences between SAP and the previous system:
  - RFQ templates contained within SAP

Previous System:

Small Purchase System (SPS)
_____

Word Template
_____
_____
_____
_____

SAP:

SAP

ZL - Comm. Items RFQ	ZM- Non- Comm. Items RFQ

  - Standardized solicitation number

  Previous System: 8-1-0-05-18684, MSFC-IFB-0-0205

  SAP: **02-M11-001, 02-M11-002**

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Topic 1

Generate Solicitation

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Topic 1: Overview

- Generate Solicitation

  – Maintain electronic record of the solicitation

  – Communicate the solicitation to vendors

- Process Flows: Perform Pre-Solicitation Activities and Solicit Offers

  – After completion of Initiate Acquisition Request sub-process activities

Topic 1: Objectives

- Upon completion of Generate Solicitation, individuals should be able to accomplish the following:
    - Describe the Process Flow

    - Assign Buyer

    - Perform Market Research

    - Review Estimated Value

    - Generate Solicitation Document

    - Communicate Solicitation

Topic 1: Process Flow

- Perform Pre-Solicitation Activities and Solicit Offers Process Flows
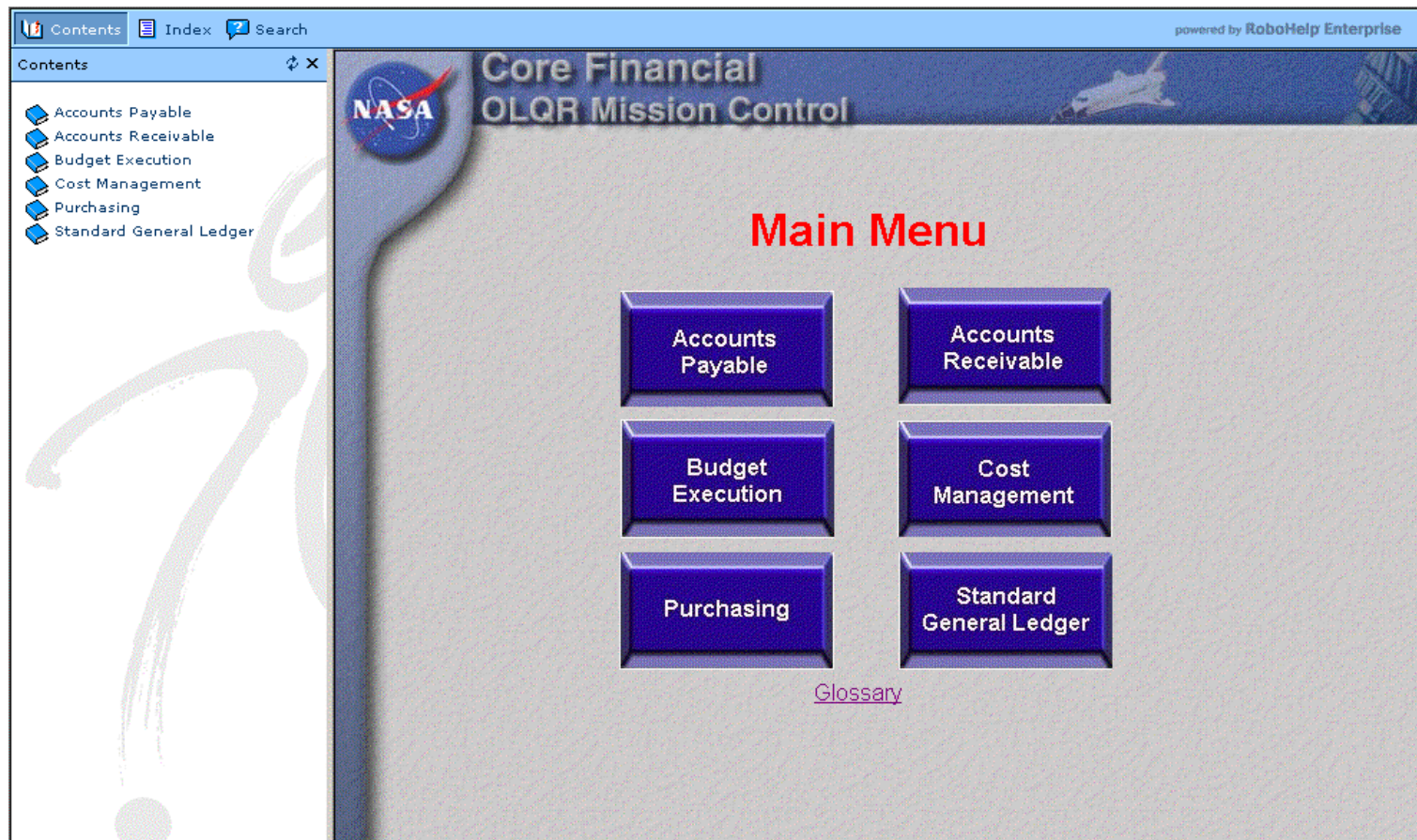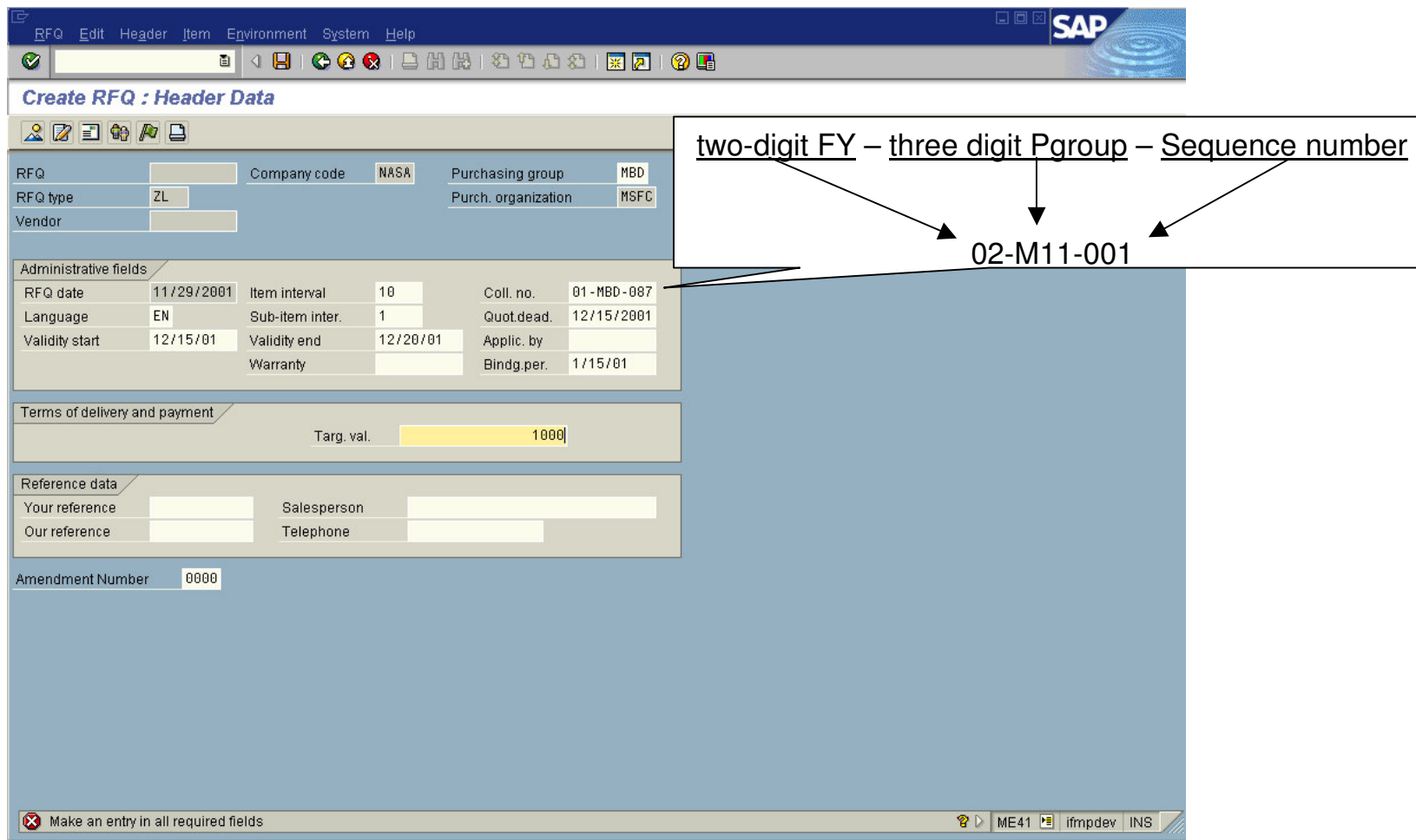
Demonstrations and Exercises Introduction
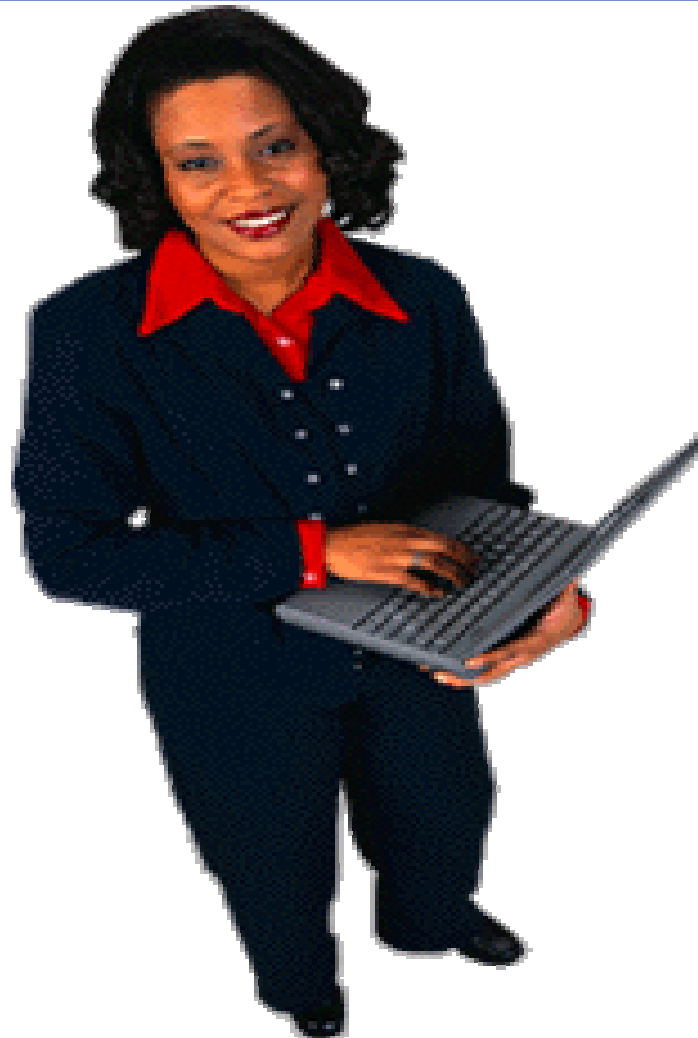
Screenshot

- Header detail screen: Collective Number

two-digit FY – three digit Pgroup – Sequence number

02-M11-001

Demonstrations and Exercises

- Assign Buyer
- Perform Market Research and Review Estimated Value
- Generate Solicitation Documents
- Communicate Solicitation

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Topic 1 Debrief

- The Procurement Team Lead assigns a buyer.

- The Buyer performs the market research and reviews the estimated value.

- The Buyer prepares the draft RFP and generates a Solicitation Document.

- The Contracting Officer communicates the draft RFP and the solicitation.

Topic 2

Amend and Cancel Solicitation

Topic 2: Overview

- Amend and Cancel Solicitation

  – Changes in requirements

  – Responses to questions regarding solicitations

  – Unresolved issues and no attainment of approvals

- Process Flows: Perform Pre-Solicitation Activities and Solicit Offers

  – After completion of Initiate Purchase Request sub-process activities

Topic 2: Objectives

- Upon completion of Request for Quotation/Quotation, individuals should be able to accomplish the following:

    – Describe the Process Flow

    – Amend Solicitation

    – Communicate Solicitation Amendment

    – Cancel Solicitation Amendment

    – Cancel Solicitation

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Topic 2: Process Flow

- Perform Pre-Solicitation Activities and Solicit Offers Process Flows
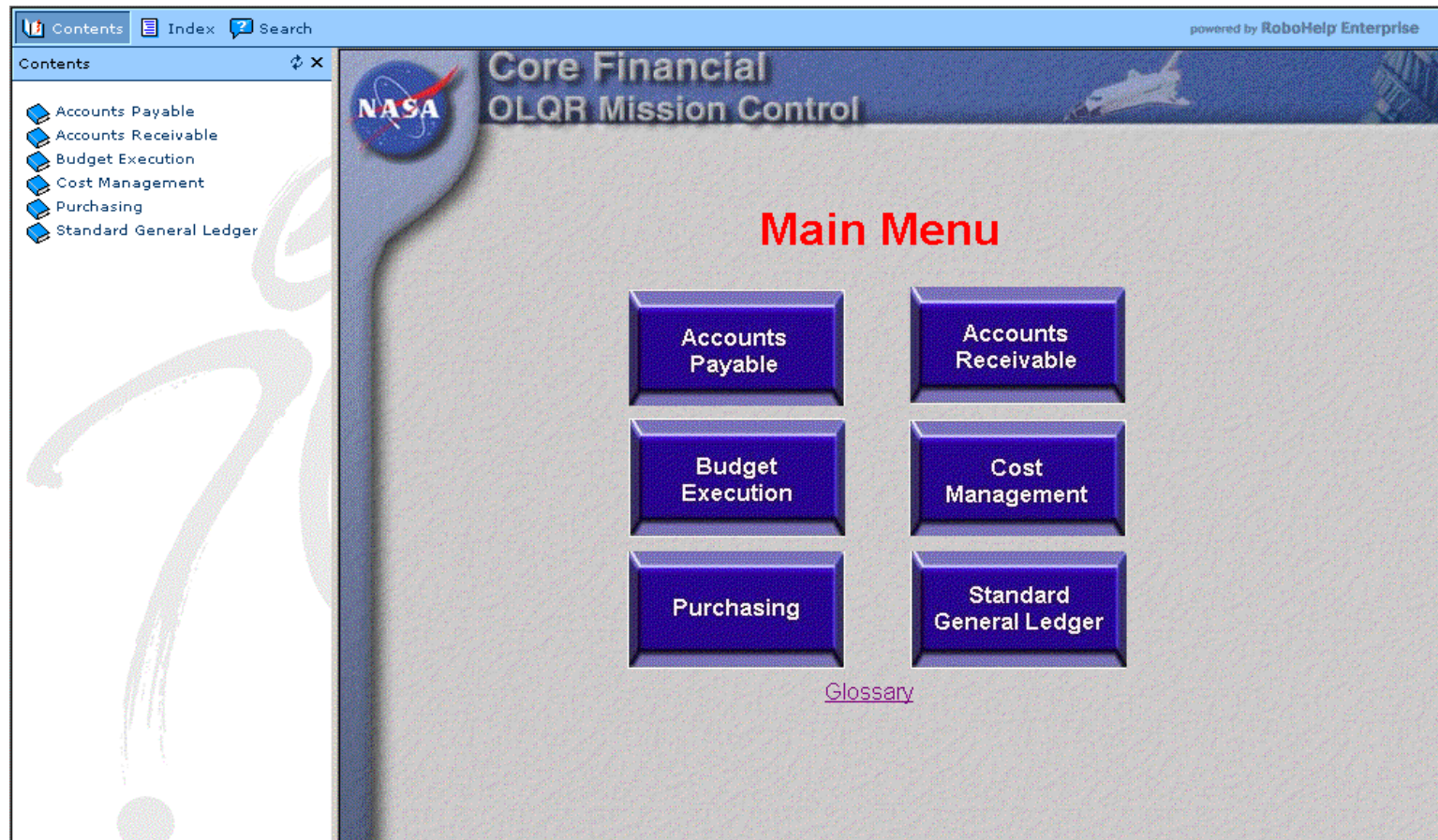
Demonstrations and Exercises
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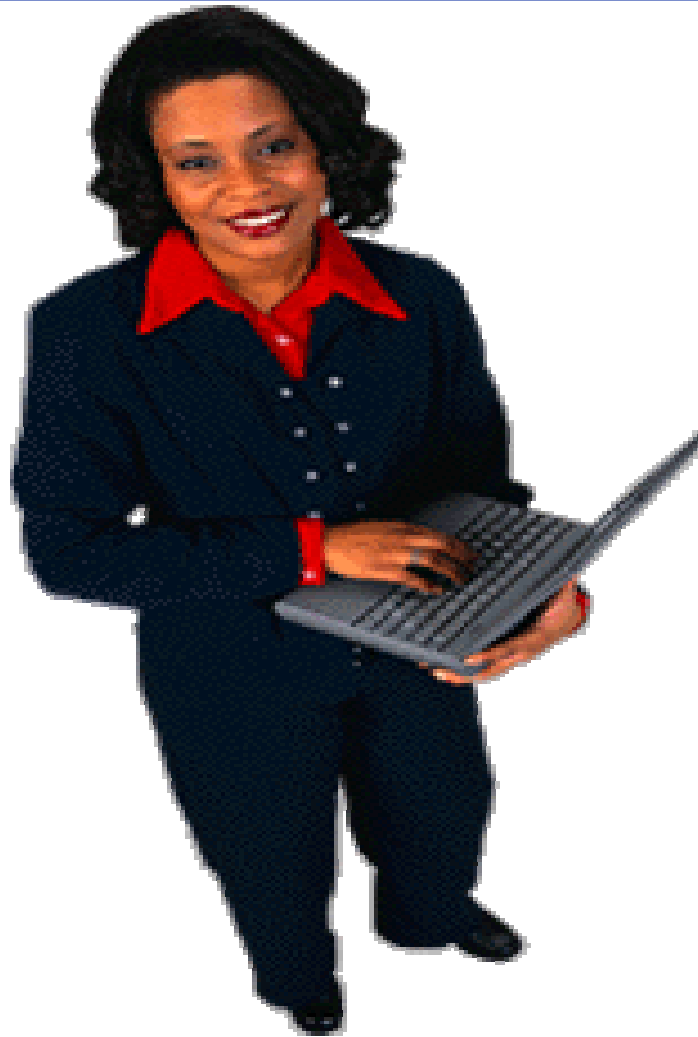
Screenshot

- Header detail screen: Change History

Demonstrations and Exercises

- **Amend Solicitation**
- **Communicate Solicitation Amendment**
- **Cancel Solicitation Amendment**
- **Cancel Solicitation**
- **Receive Proposals**
- **Perform Evaluation**

Topic 2 Debrief

- The Buyer amends the solicitation.

- The Contracting Officer communicates the solicitation amendment.

- The Buyer cancels the solicitation amendment.

- The Buyer cancels the solicitation.

Topic 3

Evaluate Offers

Topic 3: Overview

- Evaluate Offers

  - Price Comparison

- Process Flow: Evaluate Offers

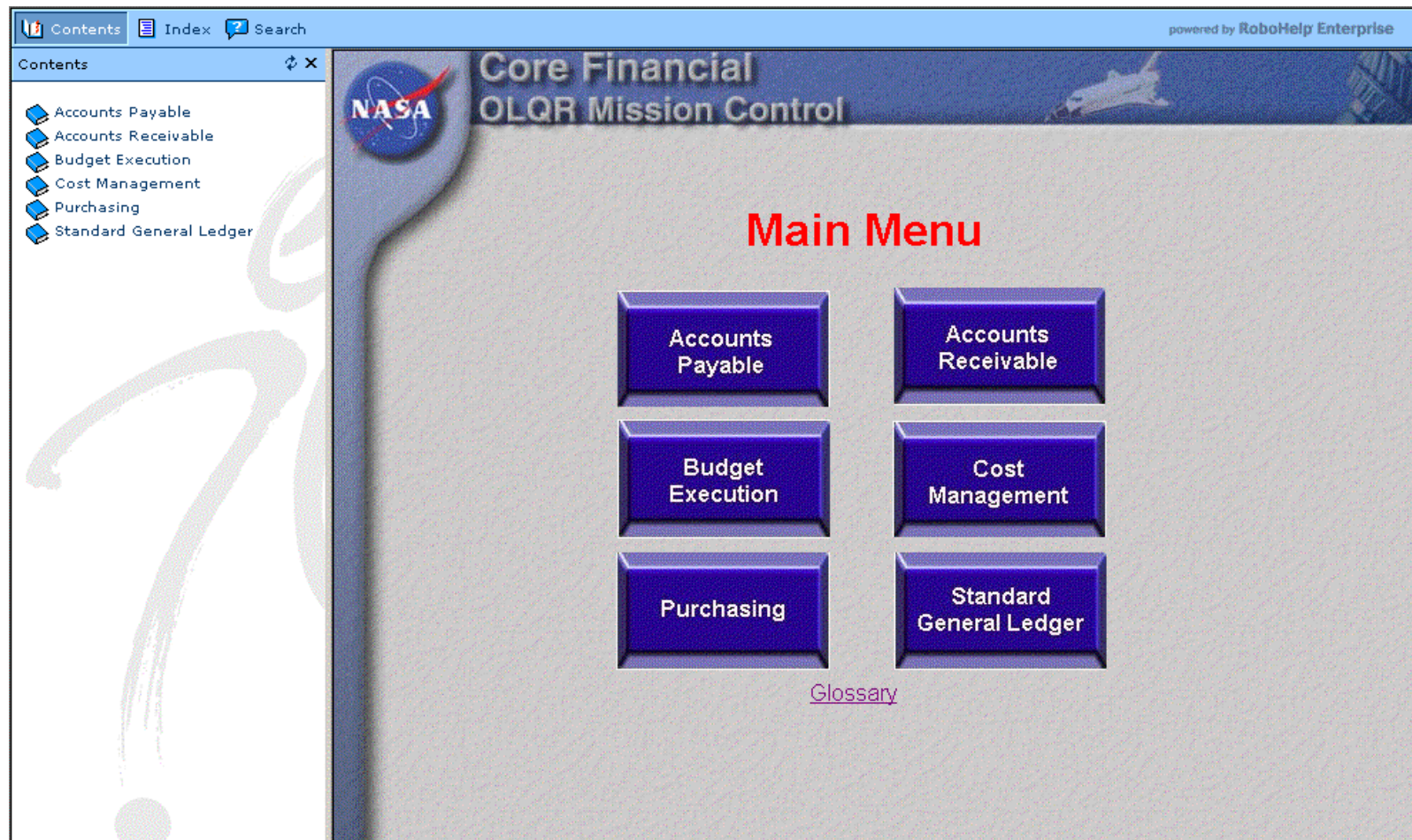 - After completion of Perform Pre-Solicitation Activities and Solicit Offers

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Topic 3: Objectives

- Upon completion of Request for Quotation/Quotation, individuals should be able to accomplish the following:

  - Describe the Process Flow

  - Receive Proposals

  - Perform Evaluations

Topic 3: Process Flow

- Evaluate Offers Process Flow

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Demonstrations and Exercises
Introduction

Screenshot

- Price Comparison List screen
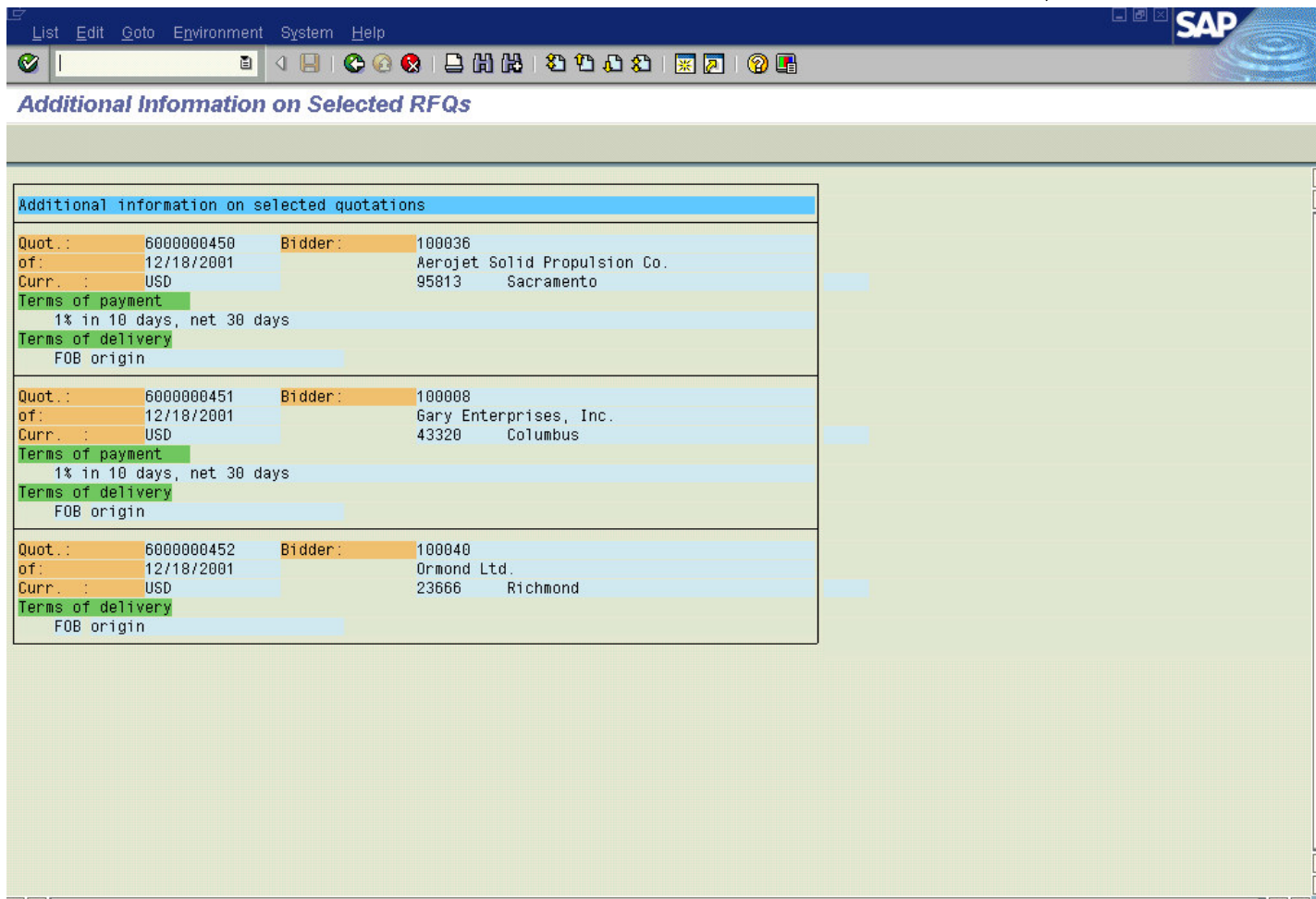
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Screenshot

- ## Additional Information on Selected RFQs

Topic 3 Debrief

- The Buyer receives the proposals and enters the quotes.

- The Buyer performs the evaluation in SAP.

End of Course Review

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Review Objectives & Expectations

Individuals here should now be able to:

✓ Perform Pre-Solicitation Activities

✓ Perform Solicitation Activities

✓ Evaluate Offers

Available Resources

- SAP Practice Training Instance

- OLQR

- Super-users within each department

- Job Aids

Extra Practice - SAP Training Instance

- Use data from course training guide to practice transactions

The training database provides a "safe" environment to develop and practice skills without affecting production.

Congratulations!

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Training Course Feedback

- The on-line training course feedback will:
  - Assess the effectiveness of the instruction and training materials for the course

- To access the feedback form:
  - Launch your Web Browser

  - Enter the following URL address:
    http://www.zoomerang.com/recipient/survey-intro.zgi?ID=S92WBAWLSKWA&PIN=994RHHDW8RK7

  - Complete and submit feedback by following the directions within the on-line form